

Section 9	Clinical Policies	08/19/06 - Originated
Subject 9.13	General Procedures	- Reviewed w/ changes
		02/14/13 - Reviewed w/o changes
<b>Policy 9.13.26</b>	<b>Guidelines for Safe Patient Handling and Movement</b>	03/19/13 - Effective
		Health System - Author

## Guidelines for Safe Patient Handling and Movement

### Definitions

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**High Risk Patient Handling Tasks:** Patient handling tasks that have a high risk of musculoskeletal injury for staff performing the tasks. These include but are not limited to transferring tasks, lifting tasks, repositioning tasks, bathing patients in bed, making occupied beds, dressing patients, turning patients in bed, and tasks with long durations.

**High Risk Patient Care Areas:** Inpatient hospital units with a high proportion of dependent patients, requiring full assistance with patient handling tasks and activities of daily living. A high risk patient care area is based on the dependency level of patients and the frequency with which patients are encouraged to be out of bed.

**Manual Lifting:** Lifting, transferring, repositioning, and moving patients using a caregiver's body strength without the use of lifting equipment/aids to reduce forces on the worker's musculoskeletal structure.

**Mechanical Patient Lifting Equipment:** Equipment used to lift, transfer, reposition, and move patients. Examples include portable base sling lifts, stand assist lifts, and mechanized lateral transfer aids.

**Patient Handling Aids:** Equipment used to assist in the lift or transfer process. Examples include gait belts, stand assist aids, sliding boards, and surface friction-reducing devices.

### Policy

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UTMB wants to ensure a safe work environment for all employees, students, volunteers and contract workers involved with patients requiring lifting or movement. To accomplish this, direct care staff on high risk patient care areas should assess high risk patient handling tasks in advance to determine the safest way to accomplish them. Additionally, mechanical lifting equipment and/or other approved patient handling aids should be used to prevent the lifting and handling of patients except when absolutely necessary, such as in a medical emergency.

### Practice

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**A. Compliance:** It is the duty of employees to take reasonable care of their own health and safety, as well as that of their co-workers and their patients during patient handling activities by following this policy. Non-compliance will indicate a need for retraining and or

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**Practice,  
continued**

corrective action.

**B. Patient Handling and Movement Requirements:**

1. Analysis of the risk to patients and staff posed by patient handling and movement shall be done prior to initiating the task.
2. Avoid hazardous patient handling and movement tasks whenever possible. If unavoidable, assess them carefully prior to completion.
3. Use mechanical lifting devices and other approved patient handling aids for high-risk patient handling and movement tasks except when absolutely necessary, such as in a medical emergency.
4. Use mechanical lifting devices and other approved patient handling aids in accordance with instructions and training

**C. Education/Training:**

1. Staff will complete and document training as required to ensure correct and proper use and understanding of safe patient handling and movement.

**D. Mechanical lifting devices and other equipment/aids:**

1. Mechanical lifting devices and other equipment/aids will be available to staff.
  - i. Mechanical lifting devices and other equipment/aids will be maintained regularly and kept in proper working order.

**E. Reporting of Injuries/Incidents:**

1. Staff shall report to their supervisor and Employee Injury Management all injuries from patient handling and movement.
2. Injury reports and supplemental injury statistics will be reported to the governing body as required by the facility.

**Accountabilities  
and  
Responsibilities**

**A. Employees shall:**

1. Comply with all parameters of this policy.
2. Complete education and training of proper technique and use of mechanical lift equipment/aids used in patient handling and movement.
3. Assess the potential for risk of injury to the patient or staff

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**Accountabilities  
and  
Responsibilities,  
continued**

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- posed by the patient handling and movement need.
  4. Use proper techniques, mechanical lifting devices, and other approved equipment/aids during performance of high-risk patient handling tasks.
  5. Refuse to perform or be involved in patient handling or movement if the task will expose the patient or staff to an unacceptable risk or injury.
  6. Notify supervisor of any injury sustained while performing patient handling tasks.
  7. Notify supervisor of need for re-training in use of mechanical lifting devices, other equipment/aids and lifting/moving techniques.
  8. Notify supervisor of mechanical lifting devices in need of repair.

**B. Supervisors shall:**

1. Ensure high-risk patient handling tasks are assessed prior to completion and are completed safely, using mechanical lifting devices and other approved patient handling aids and appropriate techniques.
2. Ensure mechanical lifting devices and other equipment/aids are available, maintained regularly, in proper working order, and stored conveniently and safely.
3. Ensure employees complete education and training as required for patient handling and movement.
4. Maintain training records as required by the facility.
5. Ensure staff has the right to refuse to perform or be involved in patient handling or movement they believe in good faith will expose a patient or employee to an unacceptable risk of injury.
6. Refer all staff reporting injuries due to patient handling tasks to Employee Injury Management.
7. Maintain incident/injury reports and supplemental injury statistics as required by the facility and requested by the Back Safety Committee.
8. Collaborate with the Back Safety Committee in evaluating the Safe Patient Handling and Movement policy.

**C. Clinical Equipment Services:**

1. Support the implementation of this policy.
  2. Furnish sufficient lifting equipment/aids to allow staff to use them when needed for safe patient handling and movement.
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**Accountabilities  
and  
Responsibilities,  
continued**

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3. Furnish acceptable storage locations for lifting equipment/aids.
  4. Shall maintain mechanical lifting devices in proper working order.

**Leadership/FOAM Planning and Development:** In planning new construction or remodeling of a patient care area, incorporate patient handling equipment or the physical space and construction design needed to incorporate that equipment at a later date.

**References**

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1. Nelson, A., et al. Identification of Patient Handling Tasks that Contribute to Musculoskeletal Injuries in SCI Nursing Practice. JAHVAH Study.
  2. Nelson, A., Gross, C., & Lloyd, J., Preventing musculoskeletal injuries in nurses: Directions for future research. SCI Journal, April 1997.
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